

MEETING NOTICE AND AGENDA
FOR THE REGULAR MEETING OF THE
STATE CONTROLLER'S FINANCIAL LITERACY ADVISORY COMMITTEE

Day: Wednesday, October 2, 2013

Time: 9:00a.m. to 11 a.m.

Location

**Milton Marks Conference Center
455 Golden Gate Ave
Lower Level – Benicia Room
San Francisco, CA 94102**

Open Session:

- **Controller Welcome and Introductions**
 - **Overview of Chp. 612 (AB 597/Eng) authorizing statute.**
 - [AB 597 fact sheet](#)
 - **State of the Field: Challenges and Opportunities**
 - [Financial Capability in the United States – 2012 Report of National Findings](#)
 - [California Financial Capability Survey Data](#)
 - [Making the Case for Financial Literacy 2012](#)
1. **Financial Literacy in the Schools**
 - a. [AB 166](#)
 - b. [Motivation and Financial Literacy](#)
 - c. [California Jump\\$tart!](#)
 - d. [Transforming the Financial Lives of a Generation of Young Americans](#)
 2. **Consumer Education**
 - a. [Implementation of Community-based Financial Literacy Programs in the U.S.](#)
 - b. [MoneyWi\\$e](#)
 - c. [MoneyWi\\$e Mini-Grant Program Report](#)
 - d. [FDIC Money Smart](#)
 3. **Retirement**
 - a. [Behavioral Economics and the Retirement Savings Crisis](#)
 - b. [Heuristics and Biases in Retirement Savings Behavior](#)

- c. [The Success of the U.S. Retirement System](#)
- d. [The Retirement Savings Crisis: Is It Worse Than We Think?](#)
- e. [Retirement Confidence Survey: Preparing for Retirement in America](#)
- f. [Secure Choice Retirement Savings Board](#)

4. Asset Building

- a. [Redesigning Matched Savings to Scale](#)
- b. [Evaluation Reports on Building Credit for the Unbanked](#)
- c. [Bank On](#)

- **Next Steps**

- Federal and State Initiatives
 - a. [Memo on Federal and State Financial Capability Initiatives](#)
 - b. [Every American Financially Empowered](#)
 - c. [The President's Advisory Council on Financial Capability – Final Report](#)
 - d. [Delaware's Stand by Me Program](#)
 - e. [Wisconsin Governor's Council on Financial Literacy](#)

- **Public Comment**

- **Adjournment**